

**BEFORE THE WASHINGTON  
UTILITIES AND TRANSPORTATION COMMISSION**

WASHINGTON UTILITIES AND  
TRANSPORTATION COMMISSION,

Complainant,

v.

PUGET SOUND ENERGY,

Respondent.

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DOCKET UE-240004 and UG-240005  
(*Consolidated*)

**EXHIBIT SNS-3**

Email from Theresa Burch to LIAC (Apr. 20, 2023)

August 6, 2024

**From:** [Burch, Theresa](#)  
**To:** [Charlee Thompson](#); [Kammeyer, Vince](#); [Phillips, Austin](#); [Jhaveri, Birud](#); [Rain, Brighton](#); [Hill, Calvin](#); [Das, Chhandita](#); [Grabowski, Christy](#); [CoreyD@ATG.WA.GOV](#); [Darrow, Destry](#); [donn.falconer@piercecounitywa.gov](#); [Englert, Eric](#); [heather.moline@utc.wa.gov](#); [Hynek, Gregg - Tamazari](#); [Regan, Jared](#); [Riley, Jared - Tamazari](#); [Inge, John](#); [Yakupova, Kelima](#); [Bregg, Kindra](#); [lorena\\_shah@oppco.org](#); [Isaili@mdc-hope.org](#); [Marie\\_stangeland@oppco.org](#); [mharvey@mdc-hope.org](#); [Wehling, Michael](#); [MistyF@communityactionskagit.org](#); [oksanas@multi-servicecenter.com](#); [PdeSaeSilva@hopelink.org](#); [rkratz@avertra.com](#); [robi.robertson@piercecounitywa.gov](#); [Hight, Ross](#); [SStokes@hopelink.org](#); [Sasville, Suzanne](#); [Newman, Valerie](#); [Martin, Veronica](#); [Kabde, Vinay](#); [Yochi Zakai](#); [Arora, Sorabh](#); [Cass, Mei](#); [Malloy, Cathy](#); [Marepally, Sai](#); [McClenahan, Kristina](#); [Sieg, Sandra](#); [Subramaniam, Jaywant](#); [Waltari, Julie](#); [jessica@byrdbarr.place](#); [amal@byrdbarr.place](#); [Suri, Tanmay](#); [Pawlak, Chris](#); [Oksana Savolyuk](#); [Khan, Abdul - Signature Commercial Solutions](#); [Bharti, Varsha - Apex Systems](#); [Garces, Natalie Beth](#); [Bevington, Sara](#); [Eagle, Nicole](#); [The Energy Project](#); [andrew.roberts@utc.wa.gov](#); [jronney@mdc-hope.org](#); [Pham, Linh](#); [Cook, Corey \(UTC\)](#); [Jen Rightsell](#)  
**Subject:** RE: Bill Discount Rate requirements revisions from PSE internal reviews  
**Date:** Thursday, April 20, 2023 3:48:26 PM

I can help a bit with this. For 180 and 181 we could modify one of those to specify customers that have also received LIHEAP from a CAP agency. We talked in one of the meetings that PSE does not know if a customer has received any other programs such as water, rental assistance, etc. That would have to come from the agency.

For #36 it was that we did not have support for PSE to start collecting demographic data in our systems in order to ensure that there would be no appearance of unfair treatment. We can use our Platform of Insights to report on customers receiving assistance in our named communities and such, and in fact that is one of the required GRC metrics.

I hope that helps and happy to discuss further at one of our next meetings.

Thanks,  
 Theresa

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**From:** Charlee Thompson <charlee@nwenergy.org>

**Sent:** Thursday, April 20, 2023 3:27 PM

**To:** [Kammeyer, Vince](#) <vince.kammeyer@pse.com>; [Phillips, Austin](#) <Austin.Phillips@pse.com>; [Jhaveri, Birud](#) <Birud.Jhaveri@pse.com>; [Rain, Brighton](#) <brighton.rain@pse.com>; [Hill, Calvin](#) <Calvin.Hill@pse.com>; [Das, Chhandita](#) <Chhandita.Das@pse.com>; [Grabowski, Christy](#) <christine.grabowski@pse.com>; [CoreyD@ATG.WA.GOV](#); [Darrow, Destry](#) <destry.darrow@pse.com>; [donn.falconer@piercecounitywa.gov](#); [Englert, Eric](#) <eric.englert@pse.com>; [heather.moline@utc.wa.gov](#); [Hynek, Gregg - Tamazari](#) <Gregg.Hynek@pse.com>; [Regan, Jared](#) <Jared.Regan@pse.com>; [Riley, Jared - Tamazari](#) <Jared.Riley@pse.com>; [Inge, John](#) <John.Inge@pse.com>; [Yakupova, Kelima](#) <Kelima.Yakupova@pse.com>; [Bregg, Kindra](#) <kindra.bregg@pse.com>; [lorena\\_shah@oppco.org](#); [Isaili@mdc-hope.org](#); [Marie\\_stangeland@oppco.org](#); [mharvey@mdc-hope.org](#); [Wehling, Michael](#) <michael.wehling@pse.com>; [MistyF@communityactionskagit.org](#); [oksanas@multi-servicecenter.com](#); [PdeSaeSilva@hopelink.org](#); [rkratz@avertra.com](#); [robi.robertson@piercecounitywa.gov](#); [Hight, Ross](#) <Ross.Hight@pse.com>; [SStokes@hopelink.org](#); [Sasville, Suzanne](#) <Suzanne.Sasville@pse.com>; [Burch, Theresa](#) <theresa.burch@pse.com>; [Newman, Valerie](#) <Valerie.Newman@pse.com>; [Martin, Veronica](#) <Veronica.Martin@pse.com>; [Kabde, Vinay](#) <Vinay.Kabde@pse.com>; [yzakai@smwlaw.com](#); [Arora, Sorabh](#) <Sorabh.Arora@pse.com>; [Cass, Mei](#) <mei.cass@pse.com>; [Malloy, Cathy](#) <Cathy.Malloy@pse.com>; [Marepally, Sai](#) <sai-ganesh.Marepally@pse.com>; [McClenahan, Kristina](#) <Kristina.McClenahan@pse.com>; [Sieg, Sandra](#) <sandra.sieg@pse.com>; [Subramaniam, Jaywant](#) <Jaywant.Subramaniam@pse.com>; [Waltari, Julie](#) <julie.waltari@pse.com>; [jessica@byrdbarr.place](#); [amal@byrdbarr.place](#); [Suri, Tanmay](#) <Tanmay.Suri@pse.com>; [Pawlak, Chris](#)

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**Subject:** Re: Bill Discount Rate requirements revisions from PSE internal reviews

**CAUTION - EXTERNAL EMAIL**

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Hi Vince,

Thanks for letting us know of the revisions and deletions of requirements. Most of them make sense to me. However, **I want to flag the deletion of requirements #36, #180, and #181.** All three were intended to measure the program's effectiveness at reaching hard-to-reach populations and ensuring BDR customers get connected to other CAP services. I believe the data would be available for at least #181 if we're able to check for LIHEAP as at least a proxy for this requirement, and I'm particularly curious about the reasoning for deleting #36.

Could we have more discussion on these requirements before deleting them?

Thank you!

**Charlee Thompson** (*she/her*)

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**From:** Kammeyer, Vince <[vince.kammeyer@pse.com](mailto:vince.kammeyer@pse.com)>

**Date:** Wednesday, April 19, 2023 at 11:34 AM

**To:** Phillips, Austin <[Austin.Phillips@pse.com](mailto:Austin.Phillips@pse.com)>, Jhaveri, Birud <[Birud.Jhaveri@pse.com](mailto:Birud.Jhaveri@pse.com)>, Rain, Brighton <[brighton.rain@pse.com](mailto:brighton.rain@pse.com)>, Hill, Calvin <[Calvin.Hill@pse.com](mailto:Calvin.Hill@pse.com)>, Charlee Thompson <[charlee@nwenergy.org](mailto:charlee@nwenergy.org)>, Das, Chhandita <[Chhandita.Das@pse.com](mailto:Chhandita.Das@pse.com)>, Grabowski, Christy <[christine.grabowski@pse.com](mailto:christine.grabowski@pse.com)>, [CoreyD@ATG.WA.GOV](mailto:CoreyD@ATG.WA.GOV) <[CoreyD@ATG.WA.GOV](mailto:CoreyD@ATG.WA.GOV)>, Darrow, Destry <[destry.darrow@pse.com](mailto:destry.darrow@pse.com)>, [donn.falconer@piercecounitywa.gov](mailto:donn.falconer@piercecounitywa.gov) <[donn.falconer@piercecounitywa.gov](mailto:donn.falconer@piercecounitywa.gov)>, Englert, Eric <[eric.englert@pse.com](mailto:eric.englert@pse.com)>, [heather.moline@utc.wa.gov](mailto:heather.moline@utc.wa.gov) <[heather.moline@utc.wa.gov](mailto:heather.moline@utc.wa.gov)>, Hynek, Gregg - Tamazari <[Gregg.Hynek@pse.com](mailto:Gregg.Hynek@pse.com)>, Regan, Jared <[Jared.Regan@pse.com](mailto:Jared.Regan@pse.com)>, Riley, Jared - Tamazari <[Jared.Riley@pse.com](mailto:Jared.Riley@pse.com)>, Inge, John <[John.Inge@pse.com](mailto:John.Inge@pse.com)>, Yakupova, Kelima <[Kelima.Yakupova@pse.com](mailto:Kelima.Yakupova@pse.com)>, Bregg, Kindra <[kindra.bregg@pse.com](mailto:kindra.bregg@pse.com)>, [lorena\\_shah@oppco.org](mailto:lorena_shah@oppco.org) <[lorena\\_shah@oppco.org](mailto:lorena_shah@oppco.org)>, [lsaili@mdc-hope.org](mailto:lsaili@mdc-hope.org) <[lsaili@mdc-hope.org](mailto:lsaili@mdc-hope.org)>, [Marie\\_stangeland@oppco.org](mailto:Marie_stangeland@oppco.org) <[Marie\\_stangeland@oppco.org](mailto:Marie_stangeland@oppco.org)>, [mharvey@mdc-hope.org](mailto:mharvey@mdc-hope.org) <[mharvey@mdc-hope.org](mailto:mharvey@mdc-hope.org)>, Wehling, Michael <[michael.wehling@pse.com](mailto:michael.wehling@pse.com)>, [MistyF@communityactionskagit.org](mailto:MistyF@communityactionskagit.org) <[MistyF@communityactionskagit.org](mailto:MistyF@communityactionskagit.org)>, [oksanas@multi-servicecenter.com](mailto:oksanas@multi-servicecenter.com) <[oksanas@multi-servicecenter.com](mailto:oksanas@multi-servicecenter.com)>, [PdeSaeSilva@hopelink.org](mailto:PdeSaeSilva@hopelink.org) <[PdeSaeSilva@hopelink.org](mailto:PdeSaeSilva@hopelink.org)>, [rkratz@avertra.com](mailto:rkratz@avertra.com) <[rkratz@avertra.com](mailto:rkratz@avertra.com)>, [robi.robertson@piercecounitywa.gov](mailto:robi.robertson@piercecounitywa.gov) <[robi.robertson@piercecounitywa.gov](mailto:robi.robertson@piercecounitywa.gov)>, Hight, Ross

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**Subject:** Bill Discount Rate requirements revisions from PSE internal reviews

Hello all,

PSE has recently conducted internal reviews of the Bill Discount Rate requirements, which has resulted in revision or deletion of several requirements.

Please review and if possible, send any feedback ASAP.

**Requirement #4:** Edited to change "by a customer" to "for a customer".

[revised] "The Bill Discount Rate program application must be for a PSE residential customer or co-customer on an active PSE account."

[original] "Bill Discount Rate program applicants must be a PSE residential customer or co-customer on an active PSE account."

**Requirement #21:** Edited to change "exempt from further eligibility verification" to "considered as fulfillment of eligibility verification".

[revised] "Bill Discount Rate program participants who had their eligibility verified by a CAP agency [through a mechanism other than self-attestation] and have an associated indicator on their PSE HELP application within a defined timeframe will be considered as fulfillment of eligibility verification."

[original] "Bill Discount Rate program participants who had their eligibility verified by a CAP agency [through a mechanism other than self-attestation] and have an associated indicator on their PSE HELP application within a defined timeframe will be exempt from further eligibility verification."

**Requirement #36:** Deleted "The Bill Discount Rate program and PSE HELP applications will include additional optional demographic questions."

**Requirement #61:** Deleted "Communications from EnergyHelp to the applicant regarding Bill Discount Rate program application processing timeframe should be configurable so as to be specific to and managed by the processing agency."

**Requirement #68:** Deleted [redundant to Requirement #196] "When an upload agency uploads a file, automatically create a Bill Discount Rate program application if one has not already been created."

Requirement #196: "For an upload agency, when the PSE HELP file syncs from Commerce, EnergyHelp will create a Bill Discount Rate program application if one does not already exist and assign it to PSE."

**Requirement #72:** Deleted "The EnergyHelp Customer Dashboard must include an indicator which differentiates between a first-time Bill Discount Rate program applicant and a Bill Discount Rate program re-applicant."

**Requirement #76:** Edited to remove "net total amounts".

[revised] "The EnergyHelp Usage Histories screen shall include customer actual amounts and discount amounts in the representation of historical customer bill data."

[original] "The EnergyHelp Usage Histories screen shall include customer actual amounts, discount amounts, and net total amounts in the representation of historical customer bill data."

**Requirement #87:** Rewritten to absorb deleted Requirements 70, 71 & 73:

[revised] "The EnergyHelp Customer Dashboard must include the Bill Discount Rate program participant's Bill Discount Rate tier, rate discount percentage, and program participation start and expiration dates."

[original] "The EnergyHelp Customer Dashboard must include the Bill Discount Rate program participant's rate, rate discount percentage, and program participation start date."

**Deleted Requirements:**

Requirement #70: "The EnergyHelp Customer Dashboard must indicate a participant's Bill Discount Rate program status."

Requirement #71: "The EnergyHelp Customer Dashboard must indicate a participant's Bill Discount Rate program bill discount tier and/or percent."

Requirement #73: "The EnergyHelp Customer Dashboard must indicate the participant's Bill Discount Rate program participation enrollment date and expiration date."

**Requirement #180:** Deleted [report data not available] "A report must be created that includes the number and percentage of Bill Discount Rate program participants that have proceeded to engage with the CAP agencies."

**Requirement #181:** Deleted [report data not available] "A report must be created that includes the number and percentage of Bill Discount Rate program participants that have proceeded to engage with the CAP agencies and have received additional non-Bill Discount Rate program assistance."

**Requirement #208:** Deleted [requirements/process has changed] "The Bill Discount Rate program and PSE HELP applications must allow the applicant to provide a single income figure and indicate their types of income from a list of income type checkboxes."

**Requirement #209:** Deleted [requirements/process has changed] "For Bill Discount Rate program and PSE HELP application processing in EnergyHelp, the income field and at least one checked income type checkbox shall be required for application submission."

**Requirement #214:** Deleted [requirements/process has changed] "The EnergyHelp Application Wizard must allow entry of a single income figure and allow indication of the applicant's types of income from a list of income type checkboxes."

Cheers,

**Vince Kammeyer**

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PUGET SOUND ENERGY

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